Entry / Exit -- Frequently Asked Questions

If you still have questions regarding Entry / Exit, please e-mail:

Sphelp@commerce.state.wi.us

1. <u>WHAT IS ENTRY / EXIT?</u>

Wisconsin ServicePoint has the ability to indicate a Client's participation in various "programs" by using the Entry/Exit functionality. This feature of ServicePoint simply creates "bookends" for the duration of a Client's "enrollment" in a "program" – where a "program" is defined by each Provider.

The function of an Entry/Exit, particularly a HUD-40118 Entry/Exit, is to take a "snapshot" of a Client's status the day he/she entered a program and then again when he/she exits a program.

ServicePoint's "canned" HUD APR will compare the Entry data with the Exit data according to HUD's requirements.

2. <u>WHEN DO YOU NEED TO USE ENTRY /EXIT?</u>

Entry / Exit can be used for any client in any program, however it is truly intended to be used for those programs that deal with a client or a household over an extended period of time such that the client or the household will have changed (more income, help for a disabling condition, better access to mainstream resources, housing, etc.)

Entry / Exit ***must be used*** for the following types of programs in order to generate the HUD-40118 APR or similar type report:
- ✓ Supportive Housing (SHP) → **HUD-40118 APR MANDATORY**
- ✓ Permanent Supportive Housing (PSHP)
- ✓ Transitional Housing (TLP)
- ✓ Long-term Case Management
- ✓ PATH

3 <u>WHAT ARE THE TYPES OF ENTRY / EXIT?</u>

There are five "types" of Entry/Exit: Basic Entry, Standard Entry, Quick Call, HUD- 40118, and PATH.
- ✓ **Basic** and **Standard** types of Entry are not tied to any of ServicePoint's "canned" reports, so their meaning must be defined by policy at the Provider level.
- ✓ A **Quick Call Entry** is automatically created when the Quick Call feature is used. *This feature is not used in the Wisconsin implementation.*
- ✓ The **HUD-40118** and the **PATH** Entry types are tied directly to ServicePoint's "canned" HUD APR and PATH Report, respectively. In order for Clients to be included in either of these reports, they must be given either a HUD-40118 Entry or a PATH Entry. These two types are strongly recommended becausae of their association with the "canned" reports.

4. **WHID IS THE HUD APR RELATIONSHIP TO THE ENTRY / EXIT?**

It is the Housing and Urban Development (HUD) Annual Performance Report (APR). The data for this report comes primarily from the HUD-40118 Entry/Exits. In addition, data comes from the HUD-40118 Assessment and the HUD Universal Data Elements Profile Assessment. The HUD APR reports on ALL clients with a HUD-40118 Entry except those who exited before the reporting period, or entered after the reporting period.

The following questions in Wisconsin ServicePoint go into making up the HUD-40118 APR:

ENTRY / EXIT	HUD- 40118 ASSESSMENT	HUD UNIVERSAL DATA ELEMENTS
~~ ***Entry Fields*** ~~	✓ Is client homeless?	✓ First name
✓ Provider - select provider for this entry	✓ Is client chronically homeless?	✓ Last name
✓ Type - select HUD 40118 entry	✓ Disability type?	✓ Date of Birth
✓ Entry Date	✓ Disability start date?	✓ Gender
~~ ***Exit Fields*** ~~	✓ Is disability long-term?	✓ Race
✓ Exit Date	✓ Monthly income:Last 30-day income?	✓ Ethnicity
✓ Reason for Leaving	✓ Monthly income: Source of income?	✓ Is client a U.S. veteran?
✓ Destination	✓ Monthly income: Start Date	✓ Type of Living Situation?
✓ Tenure	✓ Is client a victim of domestic violence?	
✓ Subsidy		

5. **How do I do an Entry / Exit**

Entry / Exits capture how long an individual or a household is in a given program. What process to follow depends on whether or not it is for an individual or a household. However, in short, the following must be done for anyone entered into the system who is to have an Entry / Exit associated with his or her name: the HUD Universal Data Elements and HUD-40118 Assessments must be filled out and and an Entry / Exit created. See the summary chart below to determine which must be done in each individual client's file and which can be applied to the household generally.

	To Be Done For Each **INDIVIDUAL CLIENT**	To Be Done By **HOUSEHOLD**
HUD UNIVERSAL DATA ELEMENTS	XXXXXXXXXXXXXXXX	
HUD-40118 ASSESSMENT	XXXXXXXXXXXXXXXX	
ENTRY / EXIT		XXXXXXXXXXXXXXXX

For step-by-step details of how to do an Entry / Exit for an individual or a household see below.

6. **How do I do an Entry / Exit for an individual client?**

✓ Add / Find a Client in ClientPoint.

✓ Ensure that all the HUD Universal Data Elements are correctly filled out.

✓ ENTER a client into a program

✓ Click on the orange Entry/Exit button from the ClientPoint Profile screen.

⁓ ENTRY⁓

✓ The Entry/Exit pop-up window will appear.

✓ Click on the Add Entry/Exit button.

✓ The pop-up window will refresh to the Entry/Exit Entry Data screen.

✓ Under Entry Data,

❖ Select the Program from the picklist of Provider

❖ Select the Type.

> **NOTE:** The Type of program is important for HUD and PATH funded programs.
> ➢ Select the HUD-40118 type if your agency is required to submit the HUD annual report and you are entering a client into a HUD funded program that requires this reporting.
> ➢ Or, select the PATH type if your Provider is required to submit the PATH report and you are entering a client into a PATH funded program that requires this reporting.
> ➢ Otherwise, it is your choice of which type of Entry / Exit to select, but there is a strong recommendation that you select HUD-40118.

❖ Enter the Entry Date that a client began the program or the client's start date. (The date must be in MM/DD/YYYY format.)

✓ Fill out the remainder of the questions on the Entry/ Exit page for that client. These questions are the HUD-40118 Assessment.

✓ Click Save Entry/Exit.

~~ EXIT ~~

✓ Click on the orange Entry/Exit button from the ClientPoint screen.

✓ A pop-up window will appear with a list of all the Programs the client is currently in. Click on the Edit Icon (pencil, found under Exit Date) next to the program from which you wish to exit the client.

Entry/Exit (willy, billy)			Add Entry/Exit	Close
Program	**Type**	**Entry Date**	**Exit Date**	
🗑 WI Department of Commerce	HUD-40118	✏04/01/2005	✏05/02/2005	
Note: Household members must be established on Profile before creating Entry/Exits.				

✓ The pop-up window will refresh to the Entry/Exit Exit Data screen.

✓ Under Exit Data,

  ❖ Exit Date: Note that the date must be entered in MM/DD/YYYY format.

  ❖ Reason for Leaving -- This is the reason that a client is leaving the program. Some options include: 'Needs could not be met' and 'Completed program.'

  ❖ Destination – This is where the client is going after they have completed or left the program. Listed in this picklist are different housing options.

  ❖ Tenure – This is whether the destination that client will be going to is permanent or transitional.

  ❖ Subsidy – This is what type of economic support the client is recieving in order to go to the destination.

  ❖ Notes – This is for any additional information you may wish to add about your client.

✓ Click on the Save and Close button.

7.   <u>**How do I do an Entry / Exit for a household?**</u>

IMPORTANT NOTE: Create household members before filling in the Entry/Exit information detailing the family's entry into a program . Household information is required for reporting on households/families. These associations also make it faster and easier for the user to record data in ServicePoint. By tying their records together, the user can perform one action to update or provide services, enter a ROI, and create an entry for an entire household. Without households, you will find yourself performing duplicate entries for each member of the household receiving services and may even forget to make required entries for all members of a household.

✓ Add/ Find one of the members of the households in ClientPoint.

✓ Ensure that the household is established.

✓ Ensure that for **each member of the household** that the following assessments are each filled out:

  ❖ HUD Universal Data Elements (Assessment attached to PROFILE PAGE) and

  ❖ The HUD-40118 Assessment (Assessment attached to Assessment Page).

    ➢ Click on Assessment Tab on the ClientPoint Profile screen in each of the household member's file.

    ➢ Click on and fill out the HUD-40118 Assessment.

NOTE: If certains members of the household have no disability, income or mainstream resource, then leave the subassessments for those individuals blank.

✓ ENTER the household into a program

     ~~ ENTRY~~

✓ Click on the orange Entry/Exit button from the ClientPoint Profile screen in one of the household member's file.

✓ The Entry/Exit pop-up window will appear.

✓ Click on the Add Entry/Exit button.

✓ The pop-up window will refresh to the Entry/Exit Entry Data screen.

✓ Under Entry Data,

     ❖ Include household members in the entry /exit by clicking on the box beside each name.

     ❖ Select the Program from the picklist of Provider

❖ Select the Type.

> **NOTE:** The Type of program is important for HUD and PATH funded programs.
> ➤ Select the HUD-40118 type if your agency is required to submit the HUD annual report and you are entering a client into a HUD funded program that requires this reporting.
> ➤ Or, select the PATH type if your Provider is required to submit the PATH report and you are entering a client into a PATH funded program that requires this reporting.
> ➤ Otherwise, it is your choice of which type of Entry / Exit to select, but there is a strong recommendation that you select HUD-40118.

❖ Enter the Entry Date that a client began the program or the client's start date. (The date must be in MM/DD/YYYY format.)

✓ Click Save Entry/Exit.

~~ EXIT ~~

✓ Click on the orange Entry/Exit button from the ClientPoint screen.

✓ A pop-up window will appear with a list of all the Programs the client is currently in. Click on the Edit Icon (pencil, found under Exit Date) next to the program from which you wish to exit the client.

Entry/Exit (willy, billy)			Add Entry/Exit	Close
Program	**Type**	**Entry Date**	**Exit Date**	
🗑 WI Department of Commerce	HUD-40118	✏04/01/2005	✏05/02/2005	

Note: Household members must be established on Profile before creating Entry/Exits.

✓ The pop-up window will refresh to the Entry/Exit Exit Data screen.

✓ Under Exit Data,

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❖ Exit Date: Note that the date must be entered in MM/DD/YYYY format.

❖ Reason for Leaving -- This is the reason that a client is leaving the program. Some options include: 'Needs could not be met' and 'Completed program.'

❖ Destination – This is where the client is going after they have completed or left the program. Listed in this picklist are different housing options.

❖ Tenure – This is whether the destination that client will be going to is permanent or transitional.

❖ Subsidy – This is what type of economic support the client is recieving in order to go to the destination.

❖ Notes – This is for any additional information you may wish to add about your client.

✓ Click on the Save and Close button.

8. **What is the significance of the start date in the disabilities, income and mainstream resources subassessments?**

Subassessments work a lot like Entry / Exit in their own way. Disabilities and Income are not permanent conditions, neccessarily, and therefore have specific durations. Each subassessments asks for the Start Date for each type of disability or each type of income source. The start date is a critical component for the APR.

The start and end dates for subassessments may be different than the client's entry or exit from a program.

For example, a client enters a program and begins recieving some income, that income amount, source and start date should each be reflected. When the client leaves the program, if he or she is still recieving that income then no change in the income subassessment would be made. See illustration below:
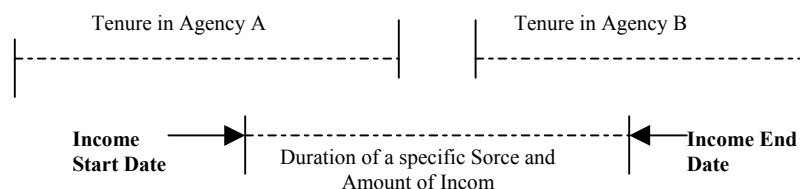
IMPORTANT NOTE: *In order for subassessment information to carry through to the HUD-40118 APR Report, the start date field must be filled out.* If a start date is unknown, then either make a best guess as to a start date or use a date that is the same or that precedes the entry date for the entry / exit.

9. **How do I add someone to an Entry / Exit that is already created?**

If you do not enter a household member into the program, you may do so later by opening the Entry/Exit screen and clicking the Edit Icon (pencil). Then, just select the household member and click Add Related Entry/Exit.

10. **How do I remove one individual from a Entry / Exit for a household but keep the rest of the household members still in the original Entry / Exit.**

If one household member exits the program but the other household members remain, you may exit just one of the clients without removing the whosle household. Open Entry/Exit screen and clicking the Edit Icon (pencil) under the Exit for the client that is leaving the program. Then, make sure there is **NO check in the box** next to the the names of the other household members. Complete the Exit Assessment.